



SHARED LEAVE (DONOR)

Change Record:

Change Date: 4.24.13 11.07.13	Changed by: J Kistler / D Wallace J Kistler/ J Prevo
Changes:	Converted to new BPP layout Step 20 <ul style="list-style-type: none"> Added new Information box Added Additional Resources at end of document Changed OSP to OSHR

Trigger:

There is a need to record the leave an employee is donating to another employee who has been approved to participate in the Voluntary Shared Leave program.

Business Process Procedure Overview:

The State of NC has a policy that permits an employee to donate leave to another employee who has been approved to participate in the Voluntary Shared Leave (VSL) program. An employee can donate Vacation, Bonus or Sick leave to another employee according to OSHR policy. The Absence Donation/Withdrawal Infotype (Infotype 613) enables the leave donation functionality. In BEACON, leave donations will be made directly to another employee's VSL quota.

There is a single subtype of Infotype 613 that is relevant for leave donations:

Donation (Subtype 0001) - Upon creation, the donation record (infotype 0613) will automatically create a time quota compensation record (infotype 0416) to deduct the amount from the donors balances and a quota correction record (infotype 2013) to apply the donation to the receiving employees VSL (voluntary shared leave) quota.

CRITICAL: In order for a leave donation to be correctly processed, the receiving employee must have a current Absence Pool record (Infotype 696). These steps are detailed in the *PA61 - Shared Leave (Recipient) BPP*. Verify these steps have been completed before continuing.

This BPP will detail:

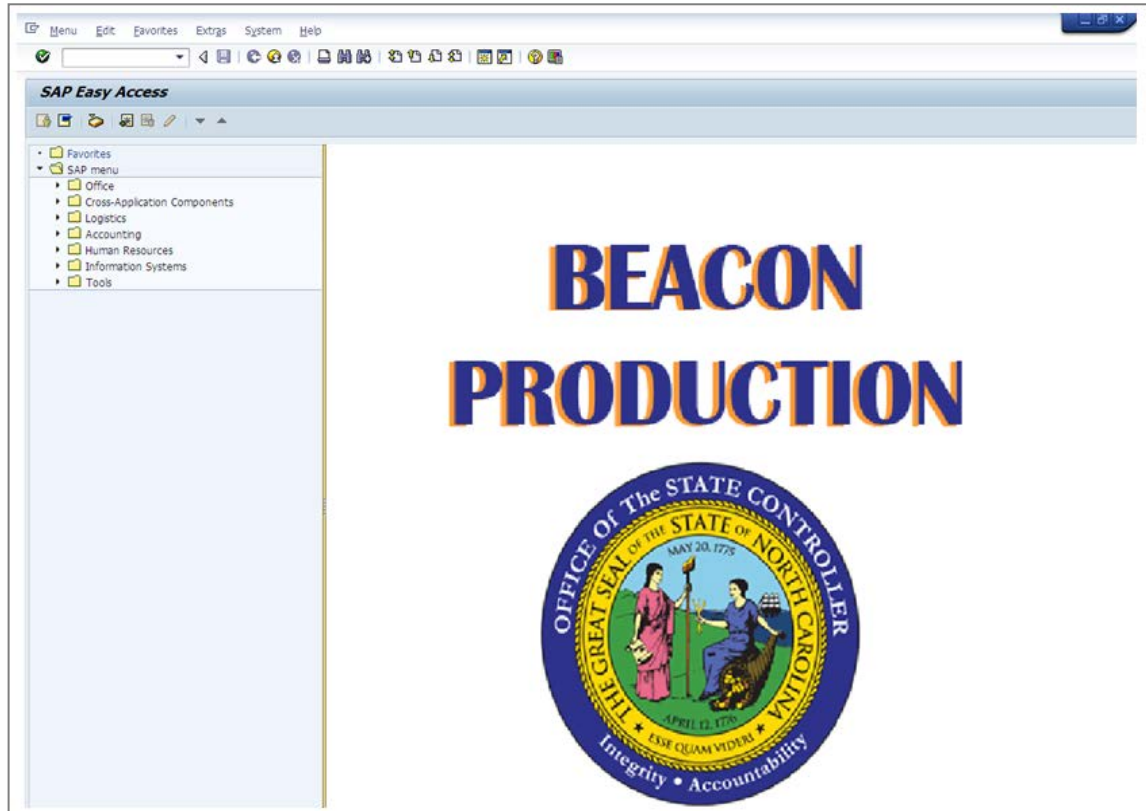
- 1) Creating a leave donation record
- 2) Verifying the deduction from the selected quota

NOTE: If you are processing Shared Leave across agencies, BEST Shared Services must assist in the process.

Access Transaction:

Via Menu Path:	SAP menu >> Human Resources >> Time Management >> Administration >> Time Data >> PA61 – Maintain Time Data
Via Transaction Code:	PA61


PROCEDURE



1. Update the following field:

Field Name	Description	Values
Command	White alphanumeric box in upper left corner used to input transaction codes	Enter value in Command. Example: PA61

2. Click the **Enter**  button.

**Information**








You may want to enter this transaction code in your Favorites folder.

- Choose **Favorites > Insert Favorites**
- Type in **PA61**
- Click **Enter**.

To see the transaction code displayed in front of the link in your favorites:

- Choose **Edit > Settings**.
- Place a check next to **Display Technical Names**.
- Click **Enter**.

Maintain Time Data

 List entry |  Week |  Month |  Year

Personnel no.

3. Update the following field:

Field Name	Description	Values
Personnel No.	Unique employee identifier	Enter value in Personnel No. Example: 80000895

4. Click the **Enter**  button.

Ensure the correct personnel number was entered after clicking Enter.

Maintain Time Data

Personnel no. 80000895

Name Sang Schubert01

EESubgroup A1 SPA Employees PersA 4601 Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm CostC 4699999999 CULTURE RESOURC...

Working times Additional account assignments Time quotas Time manag...

Infotype text s..

Absences

Attendances

Time Events

Overtime

Substitutions

On-Call

Time Transfer Specifications

Employee Remuneration Info

Period

☒ Period

From To

☐ Today ☐ Curr.week

☐ All ☐ Current month

☐ From curr.date ☐ Last week

☐ To Current Date ☐ Last month

☐ Current Period ☐ Current Year

Choose

Direct selection

Infotype STy

5. Update the following fields in the Period and Direct selection areas:

Field Name	Description	Values
From	Effective date of the personnel action	Enter value in From. Example: 10/30/2012
To	Ending date of the specified date range	Enter value in To. Example: 12/31/9999
Infotype	Unique number identifying the type of data to be displayed.	Enter value in Infotype. Example: 613
Sty	Infotype subtype	Enter value in STy. Example: 0001

The *From* and *To* fields should contain the same date and reflect the date of the donation.

6. Click the **Enter**  button.
7. Click the **Create (F5)**  button.



CRITICAL!

In order for a leave donation to be correctly processed, the receiving employee must have a current Absence Pool record (IT0696). These steps are detailed in the *PA61 - Shared Leave (Recipient) BPP*. Verify these steps have been completed before continuing.

Create Absence Donation Administration US(0613)

Personnel No 80000895 Name Sang Schubert01
EEGroup A SPA Employees PersA 4601 Cultural Resources
EESubgroup A1 FT N-FLSAOT Perm Statu Active
Start 10/30/2012

Absence Donation Administration US

Abs.quota type
Number/Unit
10 Vacation Leave (342.630000 Hours)
15 Sick Leave (341.110000 Hours)

☒ Employee ☐ Amount Related
Personnel no.
Target Abs. quota
☐ External Recipient
Ext. Person
Absence Quota Type

8. Click the **Abs.quota type** drop-down list.
9. Select **Vacation Leave (342.630000 Hours)** in the list box.

The Abs. quota type drop-down list also provides the current balance for donating employee's eligible quotas.



Information

All of an employee's quotas will be displayed; however OSHR police only allows specific types of leave to be donated. Refer to OSHR policy for specific rules concerning leave donation.

Create Absence Donation Administration US(0613)

Personnel No 80000895 Name Sang Schubert01

EGroup A SPA Employees PersA 4601 Cultural Resources

ESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 10/30/2012

Absence Donation Administration US

Abs.quota type 10 Vacation Leave (342.630...)

Number/Unit ☒

☒ Employee ☐ Amount Related

Personnel no.

Target Abs. quota


☐ External Recipient

Ext. Person

Absence Quota Type

10. Update the following field:

Field Name	Description	Values
Number/Unit	Enter number/unit of items out on a loan.	Enter value in Number/Unit. Example: 16



Information

Refer to OSHR policy for minimum donation amounts associated with the VSL program.

11. Update the following field:

Field Name	Description	Values
Personnel no.	Unique employee identifier	Enter value in Personnel no. Example: 80000715

12. Click the **Enter**  button.

TIP: Click **Enter** after entering a personnel number to refresh the transaction. This enables the receiving employee's quotas to be displayed in the Target Abs. quota drop down list. If the transaction is not refreshed, no target quotas are displayed due to the system not yet processing the receiving employee.

Create Absence Donation Administration US(0613)

Personnel No 80000895 Name Sang Schubert01

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 10/30/2012

Absence Donation Administration US

Abs.quota type 10 Vacation Leave (342.630 ...)

Number/Unit 16.00 Hours

☒ Employee ☐ Amount Related

Personnel no. 80000715 Joel Veale01

Target Abs. quota

☐ External Recipient

Ext. Person

Absence Quota Type

Target Abs. quota	
Internal Recipient	36 Adv Vacation Hrs Owed
Ext. Person	37 Adv Sick Hrs Owed
Absence Quota Type	40 Holiday Leave
	50 Bonus Leave
	61 Adv Weather Hrs Owed
	65 Community Service Leave
	66 Community Svc-Tutoring
	80 Received Shared Leave
	85 Military Leave (Training)

13. Select **Received Shared Leave** in the Target Abs. quota list box. (You will need to scroll down to see the Received Shared Leave options.)

The leave may only be donated into the receiving employee's Received Shared Leave quota.

Create Absence Donation Administration US(0613)

Personnel No 80000895 Name Sang Schubert01

EEGroup A SPA Employees PersA 4601 Cultural Resources

EESubgroup A1 FT N-FLSAOT Perm Statu Active

Start 10/30/2012

Absence Donation Administration US

Abs.quota type 10 Vacation Leave (342.630...)

Number/Unit 16.00 Hours

☒ Employee ☐ Amount Related


Personnel no. 80000715 Joel Veale01

Target Abs. quota 80 Received Shared Leave

☐ External Recipient

Ext. Person

Absence Quota Type

14. Click the Save (Ctrl+S)  button.



Following the creation of a leave donation record, you can view the employee's quota balances to verify that the selected balance reflects the donation that was just processed.


In the steps above, the employee donated 16 hrs of Vacation leave. In the steps below, the donated 16 hrs are shown in the Deduction column for the employee's Vacation leave balance.

15. Click the **All** ☒ **All** radio button.

16. Update the following field:

Field Name	Description	Values
Infotype	Unique number identifying the type of data to be displayed.	Enter value in Infotype. Example: 2006

17. Click the **Enter**  button.

18. Click the **Overview (Shift+F8)**  button.

List Absence Quotas (2006)

Personnel No 80000895 Name Sang Schubert01
EE group A SPA Employees Personnel ar 4601 Cultural Resources
WS rule D01N086N MTWHF-8,SaS-O Status Active
Choose 01/01/1800 To 12/31/9999 STy.

Absence Quotas

Start Date	End Date	A...	Quota text	Start ded	End ded.	Number	Deduction	Fr
01/01/2011	12/31/2011	65	Community Service Leave	01/01/2011	12/31/2011	24.00000	0.00000	
01/01/2010	12/31/2010	65	Community Service Leave	01/01/2010	12/31/2010	24.00000	0.00000	
01/01/2009	12/31/2009	65	Community Service Leave	01/01/2009	12/31/2009	24.00000	0.00000	
04/26/2008	04/26/2008	40	Holiday Leave	04/26/2008	06/26/2008	0.00000	0.00000	
04/15/2008	12/31/9999	10	Vacation Leave	04/15/2008	12/31/9999	342.63000	16.00000	
04/15/2008	12/31/9999	15	Sick Leave	04/15/2008	12/31/9999	381.11000	40.00000	
02/20/2008	02/20/2008	40	Holiday Leave	02/20/2008	04/21/2008	8.00000	0.00000	
01/01/2008	01/01/2008	40	Holiday Leave	01/01/2008	03/02/2008	8.00000	0.00000	
01/01/2008	12/31/2008	65	Community Service Leave	01/01/2008	12/31/2008	24.00000	0.00000	

Information

If the donation is not reflected in the donating employee's quota, back out of the transaction to the SAP menu and re-enter transaction **PA61**. The donation should now be reflected on infotype 2006.

The donated leave will be available to the receiving employee the following day. The nightly Time Evaluation program will process the donation.

19. Click the **Back (F3)** button.
20. Click the **Back (F3)** button one more time to return to the SAP Easy Access menu.

Information

An *IT2013 – Quota Corrections* record must be created if any or all of the donation is unused by the recipient. Unused VSL donations must be returned to the donor per OSHR policy.

The system task is complete.

ADDITIONAL RESOURCES

Training HELP website: <http://www.osc.nc.gov/training/osctd/help/>

Student Guide	TM310 – Leave Administration <ul style="list-style-type: none">• Training HELP website > Time Management > Job Aids
BPPs	PA61 – Shared Leave (Recipient) <ul style="list-style-type: none">• <i>Training HELP website > Time Management > BPPs</i>
Job Aids	VSL Quick Reference Quotas – Terms and Concepts <ul style="list-style-type: none">• <i>Training HELP website > Time Management > Job Aids</i>